Artifact - Onboarding

DOC-1

Revised September 2026

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Artifact - User Onboarding Guide

Welcome to Artifact, the field inspection platform from Epitaph. This guide covers everything from creating your account to running inspections, tracking corrective actions, and managing your team.

Artifact comes in two parts that share the same account and the same data:

- Artifact (web) - the full platform in any browser at https://artifact.epitaph.llc. This is where you sign up, manage billing, build templates, and run the business. Works on desktop, tablet, and phone.
- Artifact Field - the companion iPhone app built for the job site. Sign in once and it works completely offline; inspections sync automatically when you're back in range.

Inspectors can work entirely from Artifact Field. Managers and admins will typically use the web app at the desk and Artifact Field in the field.

PART ONE - ARTIFACT (WEB)

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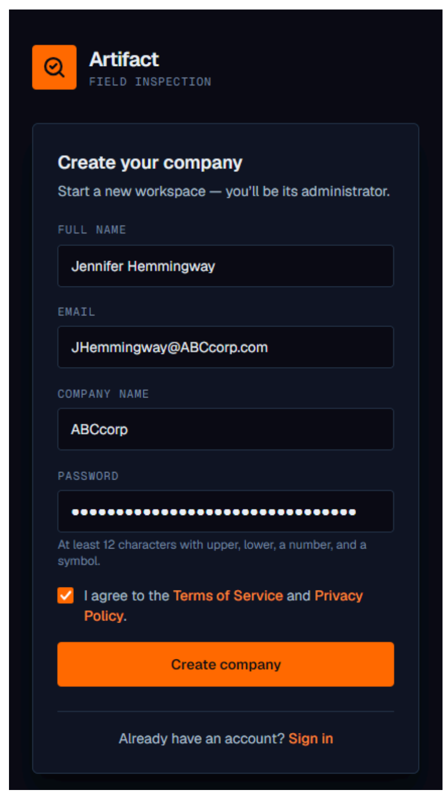
1. Getting Started

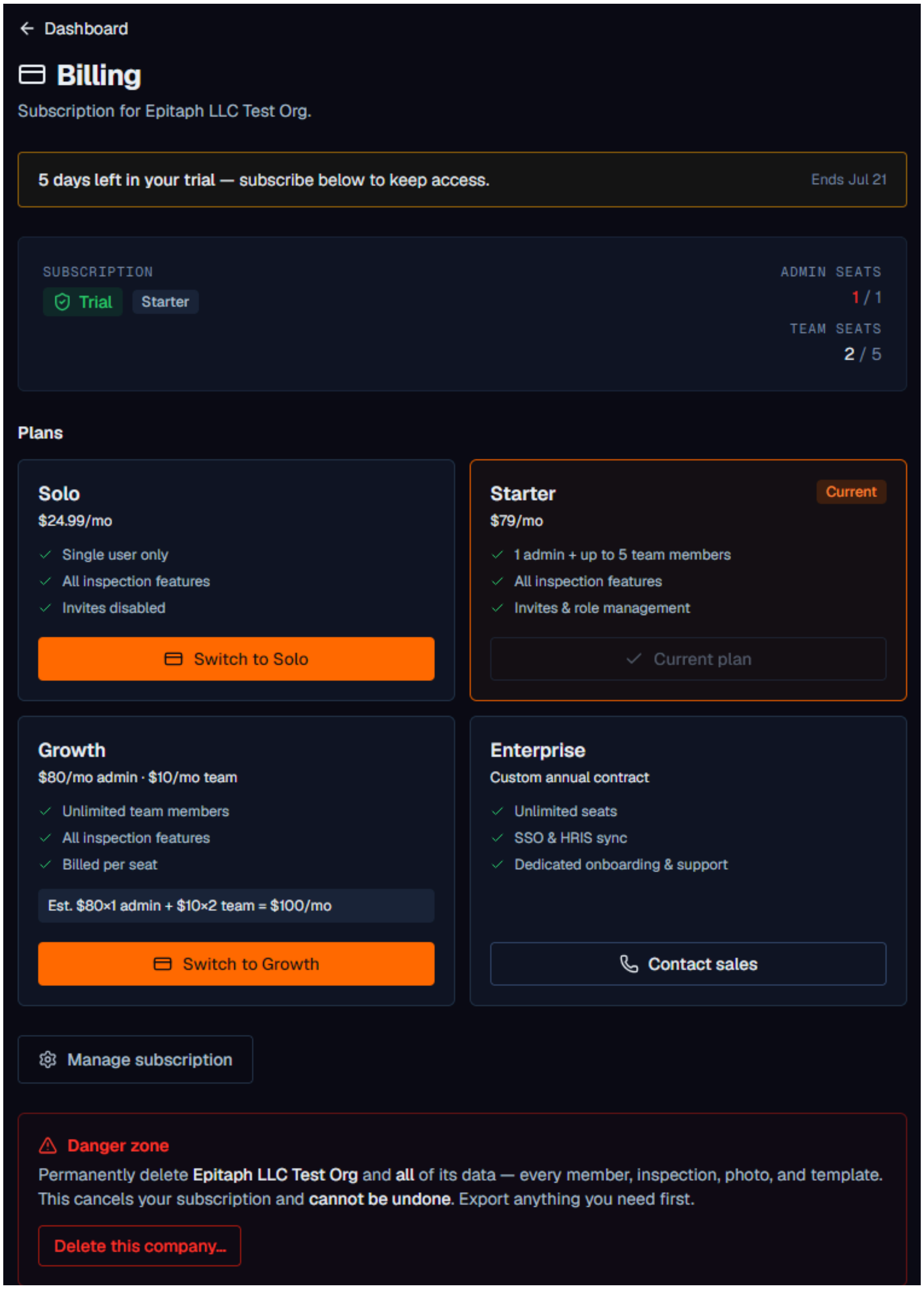
1.1 Creating a new company



If you're the first person from your company on Artifact, you'll create the company workspace and become its administrator.

1. Go to https://artifact.epitaph.llc/signup.
2. Fill in the form:
   - Full name - your name as it will appear on reports.
   - Email - your work email address.
   - Company name - the name of your organization's workspace.
   - Password - at least 12 characters with an uppercase letter, a lowercase letter, a number, and a symbol. Artifact also checks your password against known data breaches and will ask you to choose a different one if it has been exposed.
3. Check the box to agree to the Terms of Service and Privacy Policy (both open in a new tab if you want to read them first).
4. Click Create company.
5. If prompted, check your email to confirm your account, then sign in to finish setup.

After creating your company you'll land on the Billing page to start your 14-day free trial. You enter a card up front, but you won't be charged until the trial ends, and you can cancel anytime before then. (See Section 12 for plan details.)

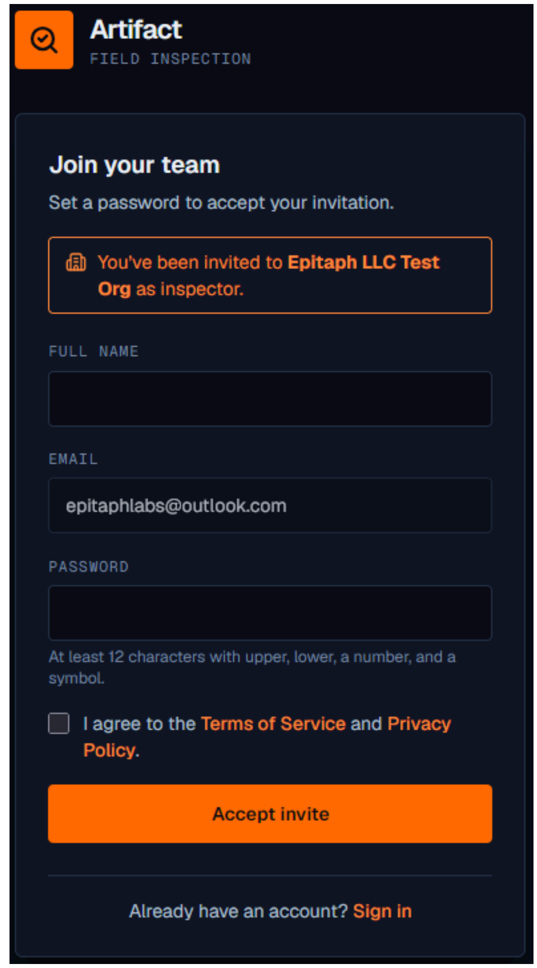


1.2 Joining an existing team

If your admin invited you, you'll receive a signup link.

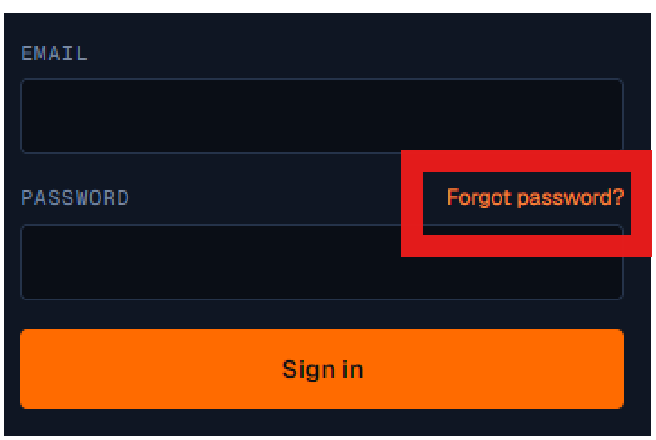
1. Open the invite link. The signup page will show "Join your team" with a banner confirming which company invited you and your role. Your email is pre-filled and locked.
2. Enter your Full name and set a Password (same rules as above).
3. Agree to the terms and click Accept invite.
4. You'll go straight to your Dashboard - no billing setup needed.

Invite links expire after 14 days. If yours has expired, ask your admin for a new one.



1.3 Signing in and resetting your password

- Sign in at https://artifact.epitaph.llc/login with your email and password.
- Forgot your password? Click Forgot password? on the sign-in page and follow the emailed reset link.



1.4 Take the tour

Once signed in, click Take a tour (the question-mark icon in the top-right header; on a phone it's inside the "⋯" menu) for a guided walkthrough of the main screens. You can replay it anytime.

1.5 Add Artifact to your phone's home screen (optional)

Artifact's web app installs like an app. In your phone browser, open artifact.epitaph.llc, sign in, then use your browser's Add to Home Screen option. It opens full-screen with its own icon. (On iPhone, most field users will prefer the dedicated Artifact Field app - see Part Two.)

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2. Roles: Who Can Do What

Every user has one of three roles:

- Inspector - runs inspections assigned to them (or starts their own from the Template Library) and works corrective actions.
- Manager - everything an inspector can do, plus: create and edit templates, assign work to their direct reports, see their team's work queue, and view Analytics and Export.
- Admin - everything a manager can do, plus: manage users and invites, branding, integrations, the audit log, and billing. Admins see the whole company, not just direct reports.

Your role is shown as a badge next to your email in the top header.

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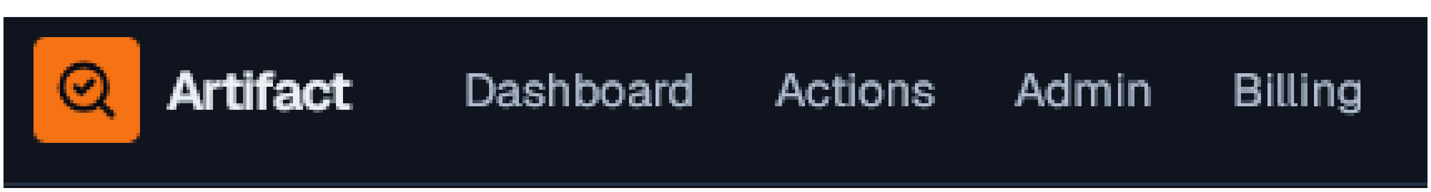
3. Finding Your Way Around

The top navigation bar has:

- Dashboard - your work queue and widgets (home screen).
- Actions - the corrective actions board.
- Admin (admins) or Templates (managers) - template management and admin tools.
- Billing (admins only) - subscription and plan management. On narrow phone screens this moves into the "⋯" menu.

On the right side of the header: your email and role badge, the tour button, a light/dark theme toggle, and sign out. On small screens these collapse into the "⋯" menu.



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4. The Dashboard

The Dashboard shows "Your assigned work, overdue items, and what's in progress."

4.1 Work queue

Your work is grouped into buckets:

- Overdue - assigned inspections past their due date.
- Open - assigned but not yet started (click Begin Inspection to start).
- In progress - inspections you've started, with a progress count (click to resume).
- Completed - finished inspections, each linking to its report.

Managers and admins also get a view toggle: My team (a manager's direct reports) or Everyone (admins). From the team view you can cancel a not-yet-completed assignment or reassign one that hasn't been started.

4.2 Other widgets

- Corrective actions - a rollup of open corrective actions, plus a filterable list.
- Open actions by location / by asset (managers and admins) - where your open issues are concentrated.
- Template Library - a collapsible section listing every active template, with its criteria count and rule badges (e.g. "Skip Allowed", "Photo on Fail"). Click Begin Inspection on any card to start an ad-hoc inspection; if the template defines locations or assets, you can pick one first.

The dashboard is customizable per user - you can show, hide, and reorder widgets, and your "mine" and "team" views each remember their own layout and filters.

Under the Dashboard title you'll also see an offline-readiness line such as "5 templates ready offline" with a refresh button - see Section 10.

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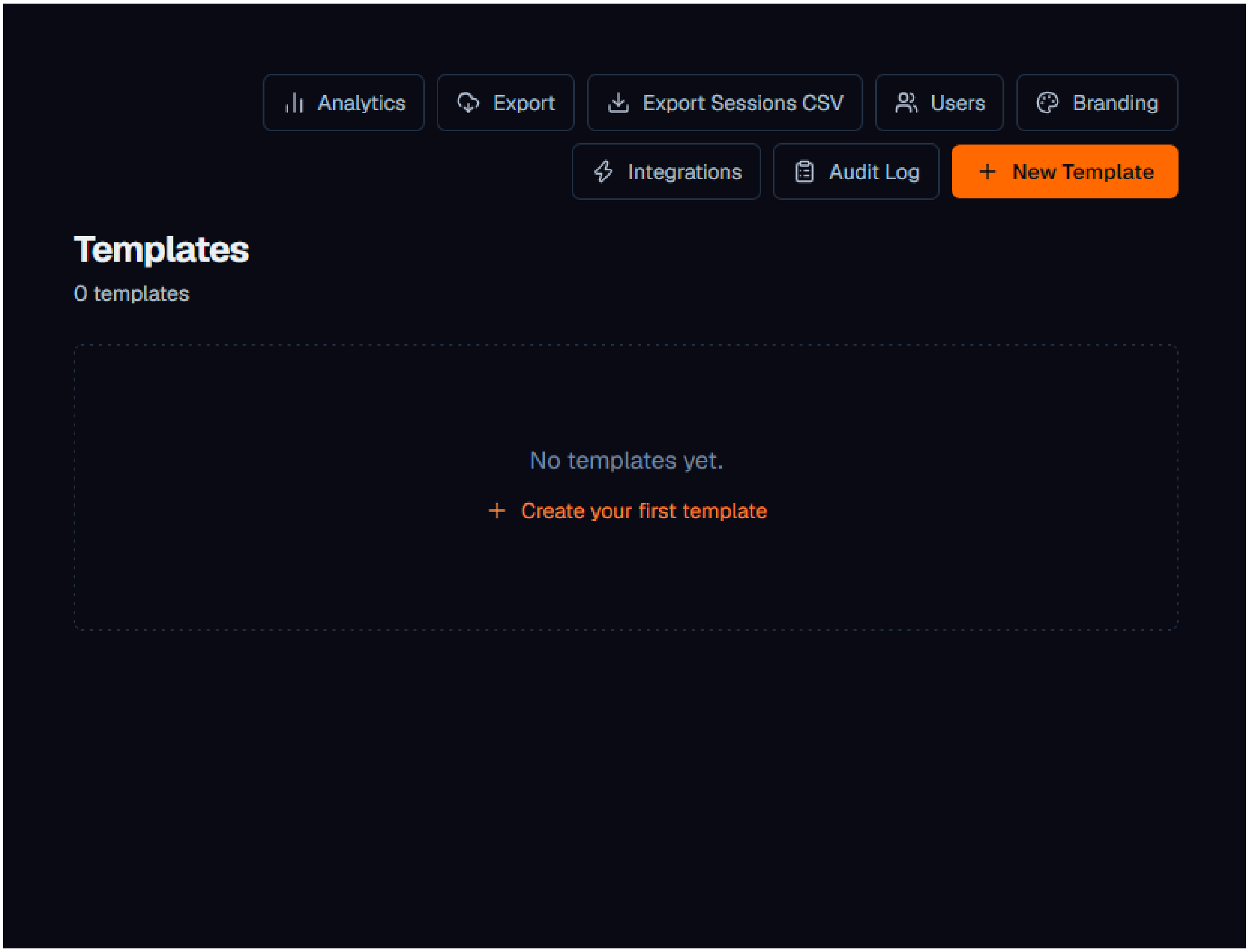
5. Creating Inspection Templates (Managers & Admins)

Templates are the reusable checklists your team inspects against. Go to Admin (or Templates) in the nav - the page lists all templates, organized into folders - then click New Template.

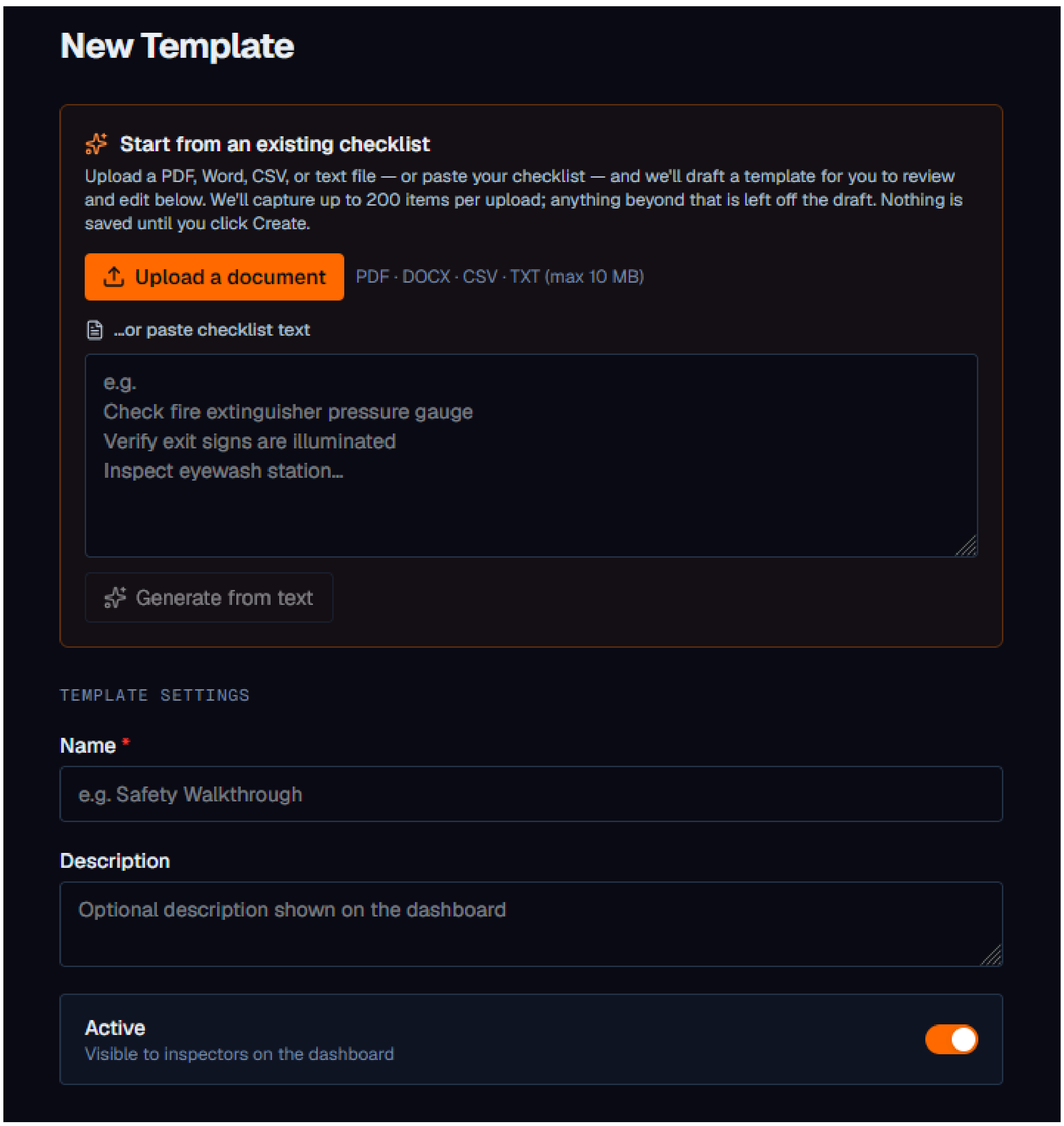


5.1 Start from an existing checklist (AI)

At the top of the new-template screen is the "Start from an existing checklist" panel. If you already have a checklist as a document, you don't have to retype it:

1. Click Upload a document and choose a PDF, DOCX, CSV, or TXT file (max 10 MB) - or expand "…or paste checklist text" and paste it, then click Generate from text.
2. A confirmation dialog titled "Review AI-generated content" reminds you that AI can misread a document - you must review every generated item before saving.
3. The draft (up to 200 items per upload) loads into the editor below for you to review, edit, and save. Nothing is saved until you click Create.

AI generations are limited per month; your usage ("X of Y AI generations used this month") appears in the panel after you generate.



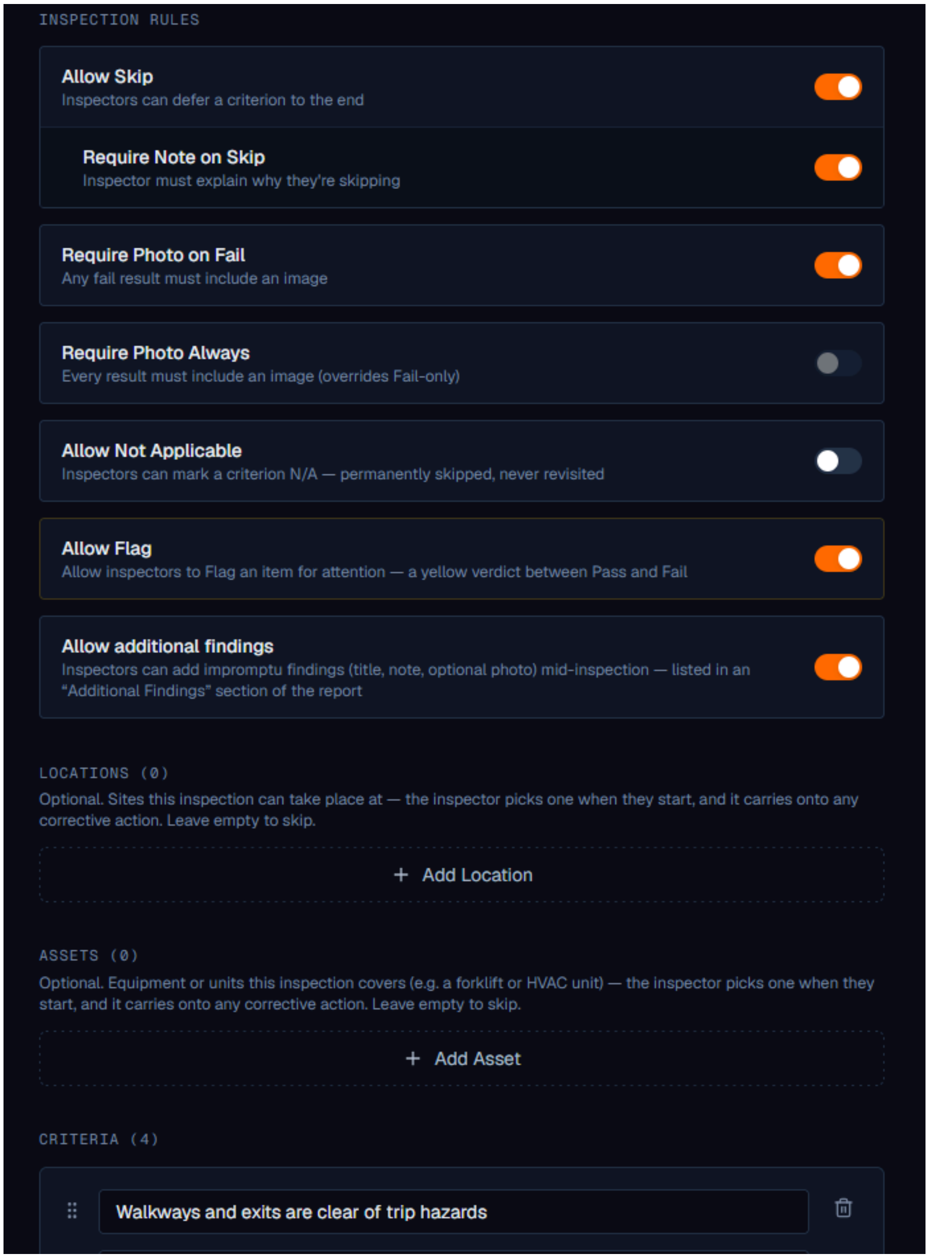
5.2 Template settings

- Name (e.g. "Safety Walkthrough") and an optional Description shown on the dashboard.
- Active - whether the template is visible to inspectors on the dashboard.

5.3 Inspection rules

Toggles that control how inspections against this template behave:

- Allow Skip - inspectors may skip an item and come back to it.
- Require Note on Skip - a skip (or N/A) must include a note.
- Require Photo on Fail - a photo is mandatory when an item fails.
- Require Photo Always - a photo is mandatory on every item.
- Allow Not Applicable - items can be marked N/A.
- Allow Flag - adds a third FLAG verdict for items that need attention but aren't outright failures.
- Allow additional findings - inspectors can log impromptu issues outside the checklist.



5.4 Locations and assets

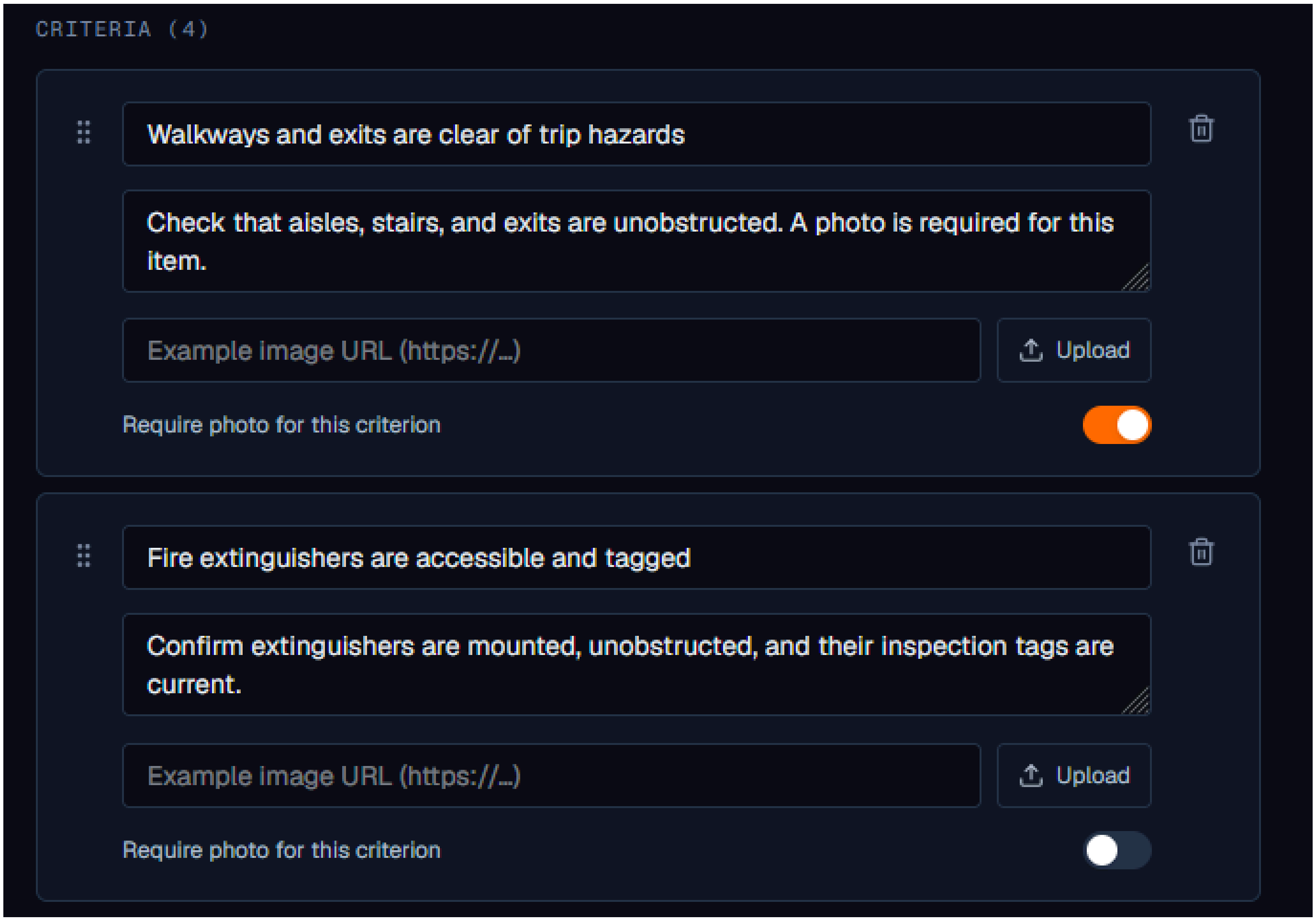
Optionally define Locations (e.g. "Building A - Floor 2") and Assets (e.g. "Forklift FL-203") on the template with Add Location / Add Asset. These let you run the same checklist against different sites or equipment - the location/asset is recorded on each inspection, can be pinned when assigning work, and powers the by-location and by-asset dashboard widgets.

5.5 Criteria

Each criterion is one checklist item:

- Title (required) and an optional description.
- An optional example image (paste a URL or upload a file) that inspectors can view in the field for reference.

Click Add Criterion to add items, then Create Template (or Save Changes when editing) to save.



5.6 Folders

Back on the Templates page you can create folders and organize templates into them to keep a large library tidy. Inspectors can filter the dashboard Template Library by folder.

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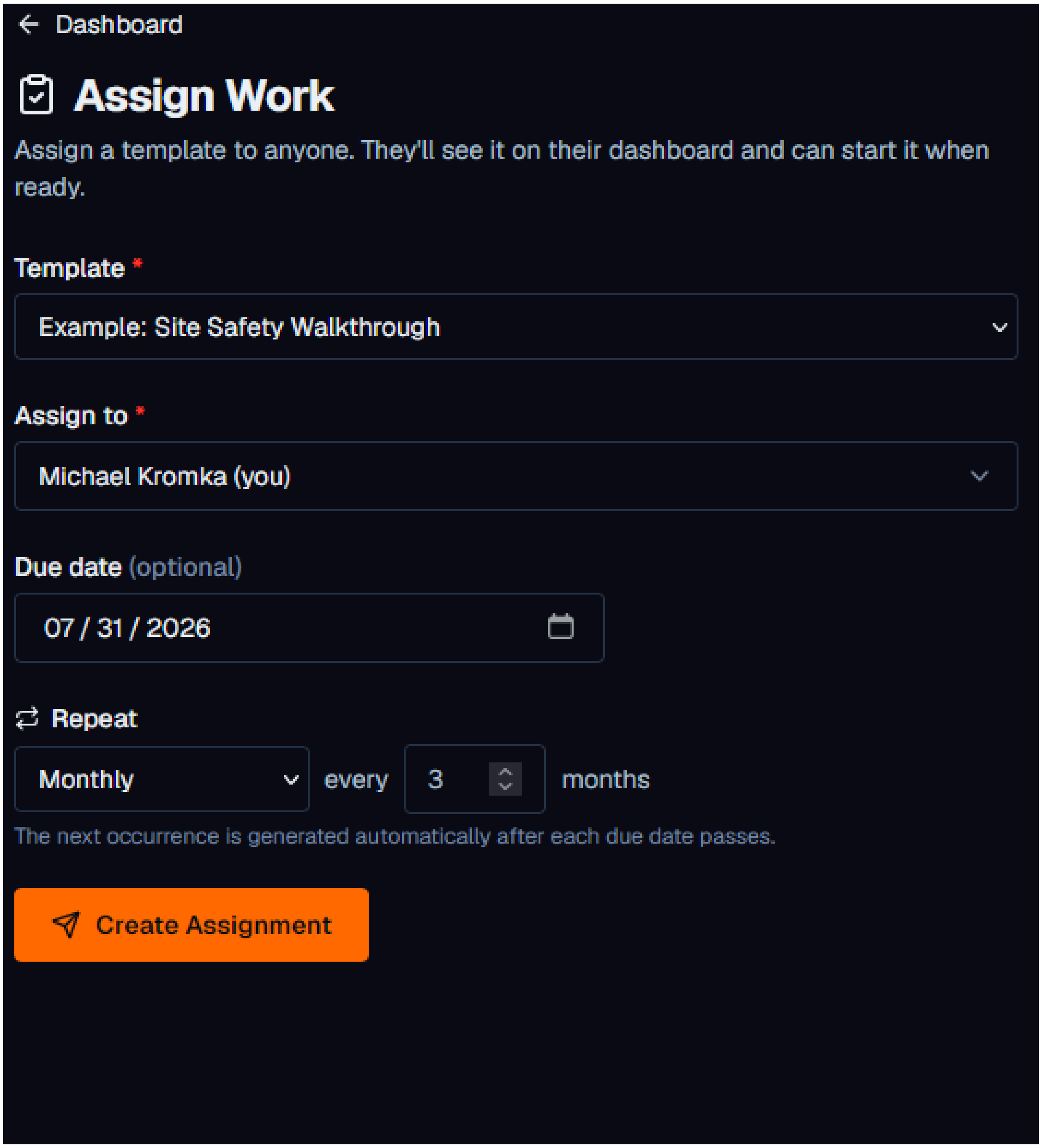
6. Assigning Work (Managers & Admins)

1. From the Dashboard, click Assign work (or go to /assignments/new).
2. Choose the Template and the Assign to person (a searchable picker; managers see their direct reports).
3. If the template defines locations or assets, optionally pin a Location and/or Asset - the inspection will be locked to it.
4. Optionally set a Due date.
5. Repeat: "Does not repeat", or Daily / Weekly / Monthly with an "every N" interval (e.g. every 2 weeks). A recurring assignment requires a due date; the next occurrence is generated automatically after each due date passes.

6. Click Create Assignment. It appears in the assignee's Open queue - on the web and in Artifact Field.



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7. Running an Inspection

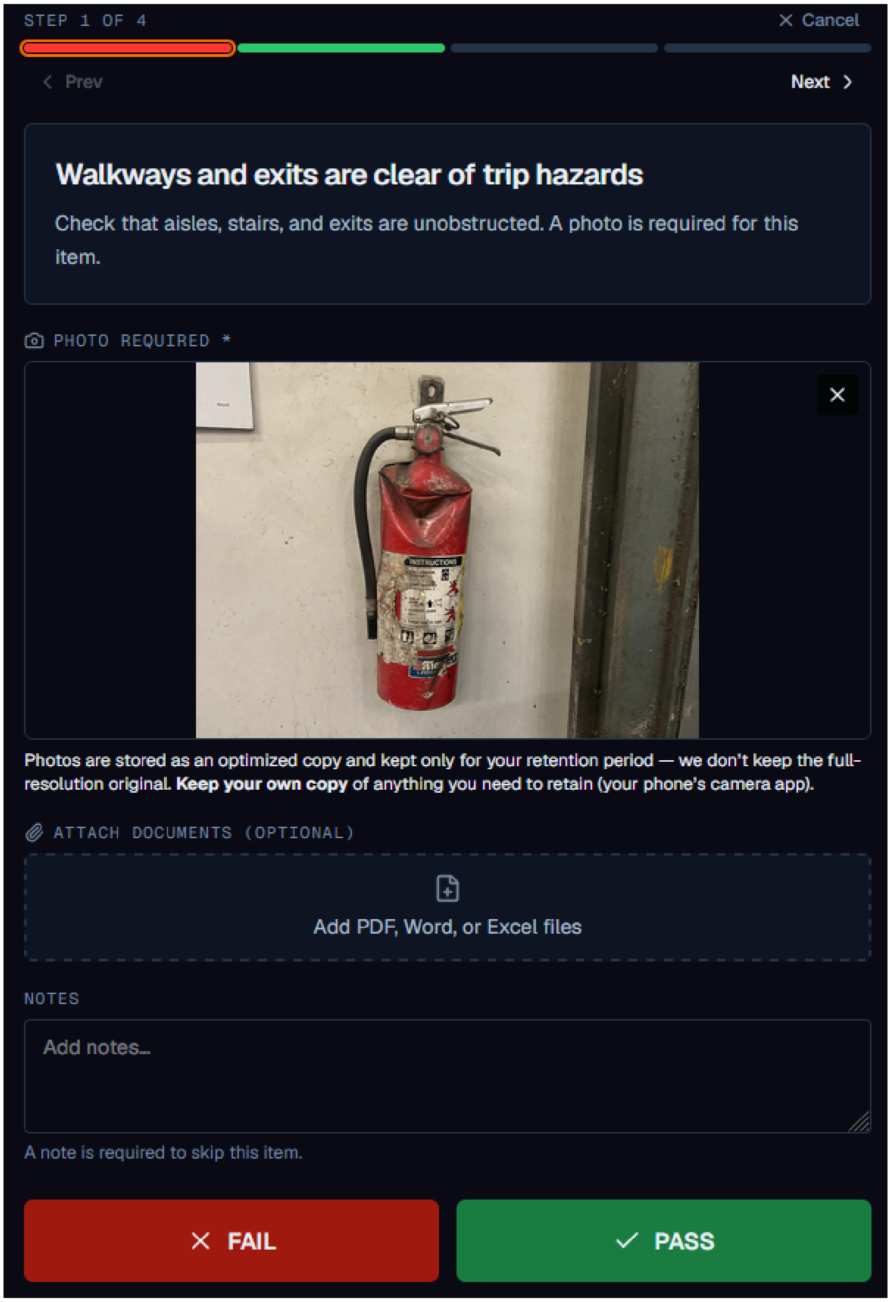
Start an inspection either from an assignment in your work queue or ad-hoc from the Template Library with Begin Inspection. (The inspection runner is identical in Artifact Field, so this section applies to both.)

7.1 The inspection runner

Each checklist item gets its own screen:

- The top shows "Step X of Y" and a colored progress bar - one segment per item. Tap any segment to jump to that item, or use Prev / Next.

- The criterion card shows the item's title and description. If the template author added a reference photo, tap View Example.



7.2 Recording your answer

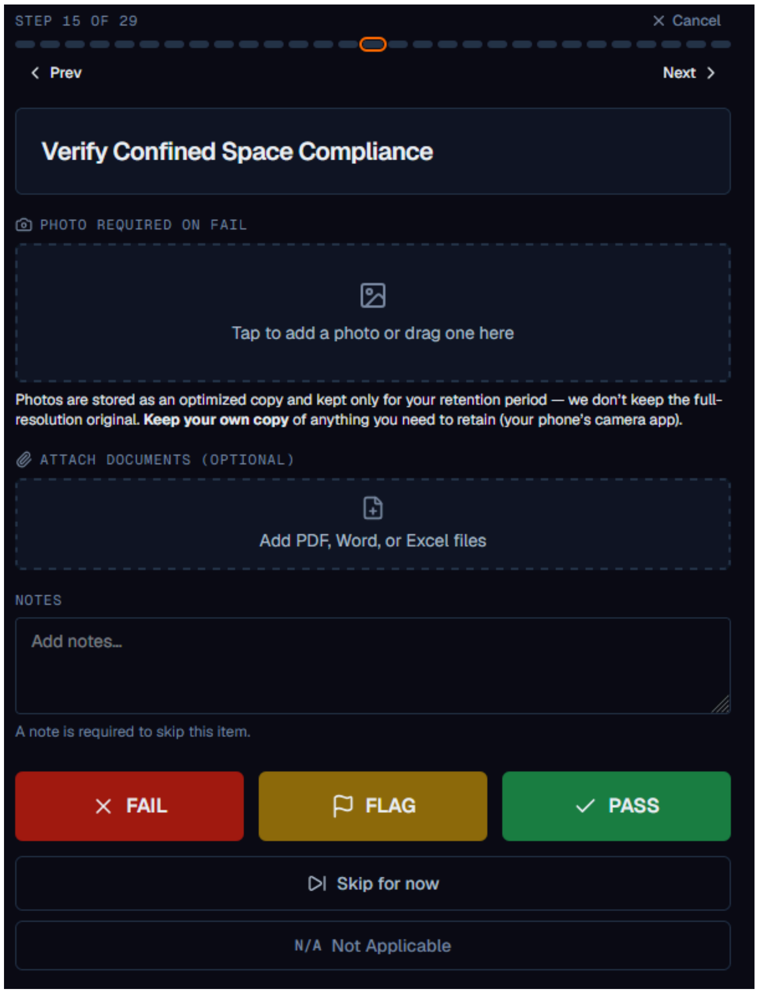
For each item you can add, then choose a verdict:

- Photo - tap the photo box ("Tap to add a photo or drag one here") to take or upload a photo. Photos are stored as an optimized copy and kept only for your retention period - Artifact does not keep the full-resolution original, so use Save original (or your phone's camera roll) for anything you need to retain.
- Attach Documents (optional) - add PDF, Word, or Excel files to an item.
- Notes - free-text notes on the item.

Then give a verdict:

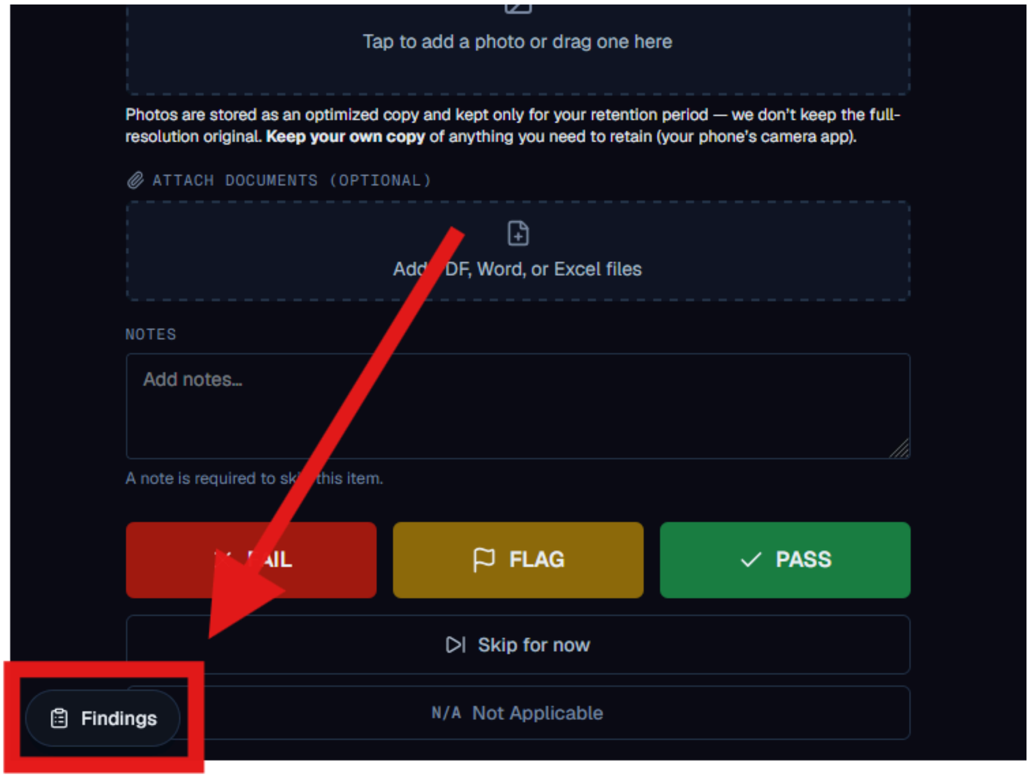
- PASS / FAIL - the big green and red buttons.
- FLAG (if enabled) - needs attention, but not a failure.
- Skip for now (if enabled) - come back to it later; skipped items return for a revisit before you can finish. A note may be required to skip.
- Not Applicable (if enabled) - the item doesn't apply.

If the template requires a photo on fail (or always), the runner won't accept the verdict without one.



7.3 Additional findings

If the template allows it, you can log Additional findings - impromptu issues outside the checklist (e.g. "Cracked floor tile near loading bay") - during the inspection so nothing you notice in the field gets lost.



7.4 Finishing

Once every item is answered, a green "All N items answered" panel appears - tap Review & Finish to complete the inspection.

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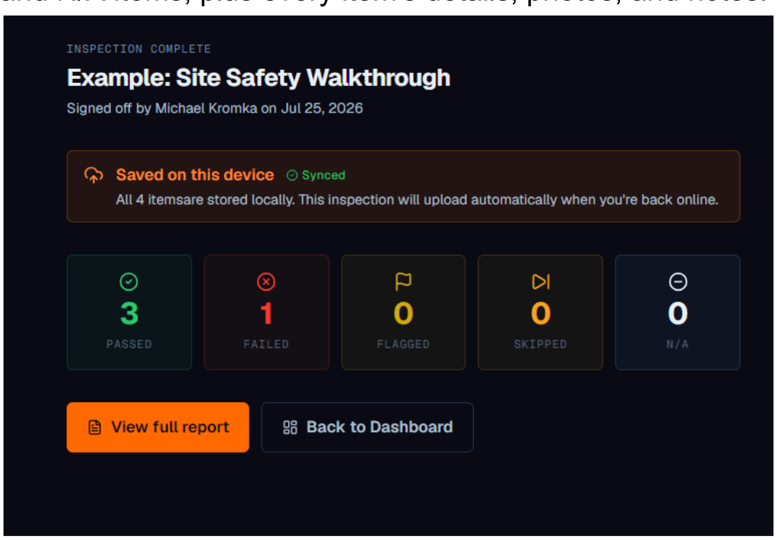
8. Reports & Sharing

After finishing, the completion page shows the results summary: counts of Passed, Failed, Flagged, Skipped, and N/A items, plus every item's details, photos, and notes.

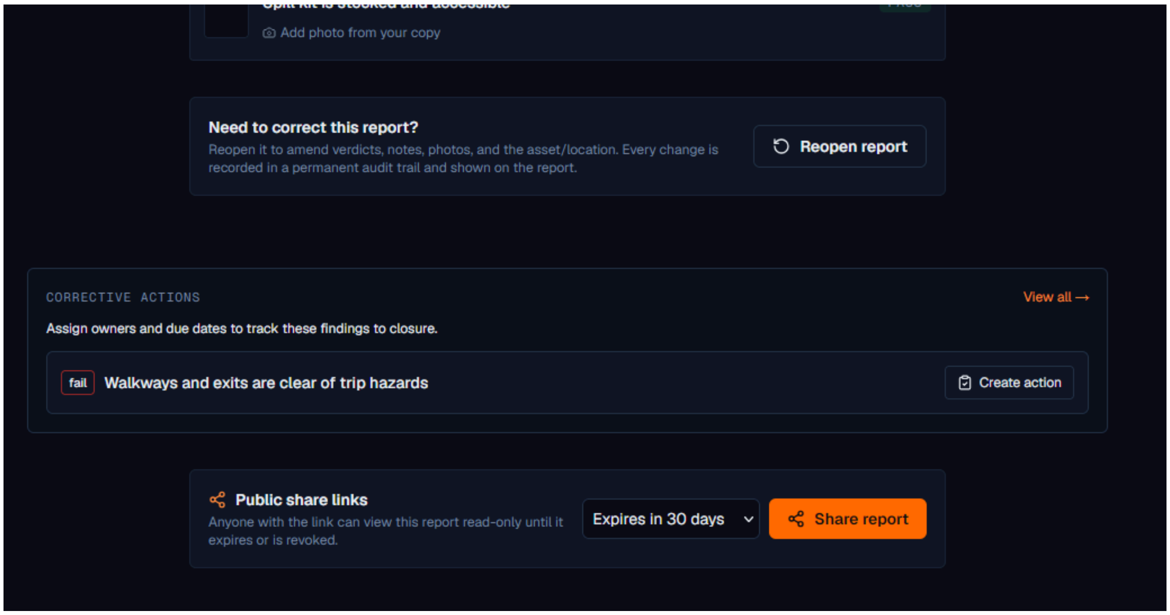


From here you can:

- Download PDF Report - a formatted, shareable inspection report.

- Download CSV - the raw results for a spreadsheet.
- Public share links (managers and admins, when enabled for your company) - mint a read-only link anyone can open without an account. Choose an expiry (1 hour, 24 hours, 7 days, or 30 days). The link is shown exactly once - copy it right away. You can revoke any active link at any time.
- Reopen (managers and admins) - reopen a completed inspection to amend results. Reopened reports carry a visible "Reopened by … on …" banner for the audit trail.

Completed inspections stay reachable from the Dashboard's Completed section.



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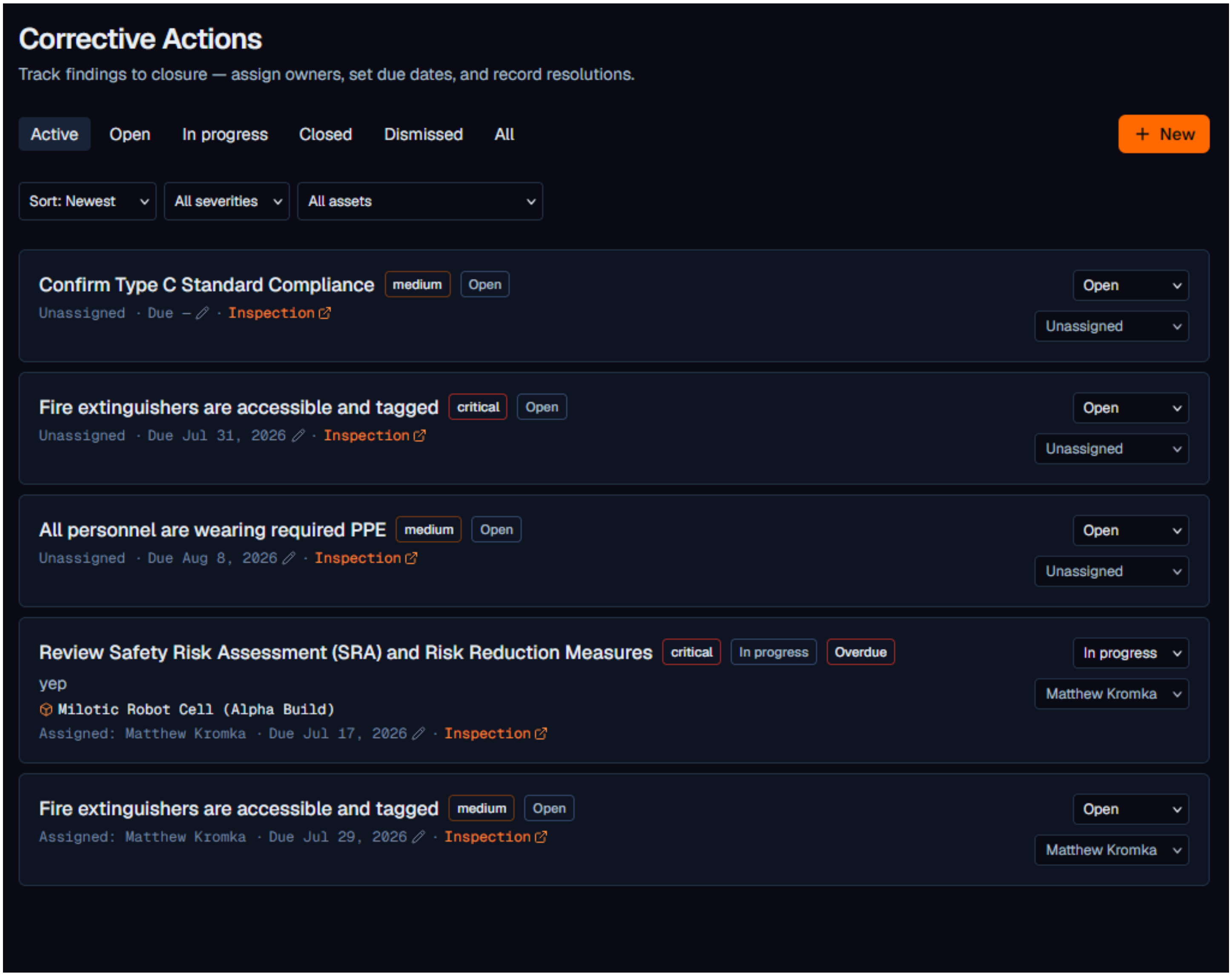
9. Corrective Actions

Failed or flagged items shouldn't die in a report. The Actions page is your corrective-action board.

- Create an action with a title ("What needs to be corrected?"), optional details, a severity (Low / Medium / High / Critical), an assignee, and a due date.
- Work actions through their lifecycle: Open → In progress → Closed (or Dismissed). Overdue actions are badged.
- Filter and sort by severity, location, asset, and by newest / due date / severity.

The Dashboard's corrective-action widgets summarize what's open, and managers can see open actions grouped by location and asset.



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10. Working Offline (Web)

The web app also works without a connection:

- Templates are cached automatically. The Dashboard shows "N templates ready offline" with a manual refresh button.
- Start and run inspections offline. Begin Inspection works without a connection; photos, notes, and verdicts are stored on your device.
- Everything syncs automatically when your connection returns. An indicator bar below the header shows your status (offline / syncing / synced), and in-progress offline work appears in your queue like any other inspection.

Tip: open the app once while online on the device you'll take into the field, so your templates are cached before you lose signal. On iPhone, Artifact Field (Part Two) is the better tool for this - it's built offline-first.

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11. Admin Tools

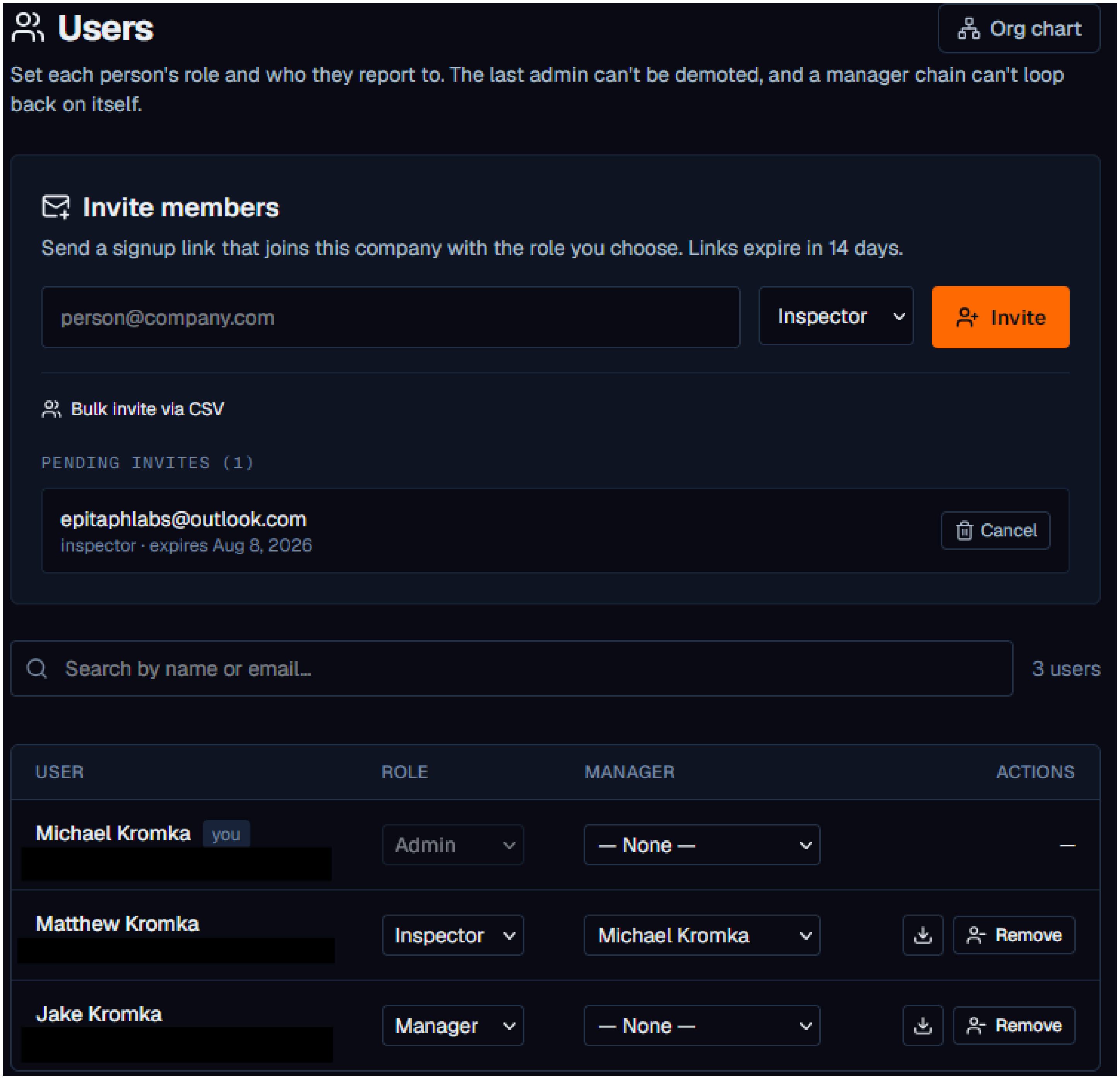
All of these live under Admin in the nav. The buttons across the top of the Admin page: Analytics, Export, Users, Branding, Integrations, Audit Log, New Template.

11.1 Users & invites (admins)

Admin → Users is where you build your team:

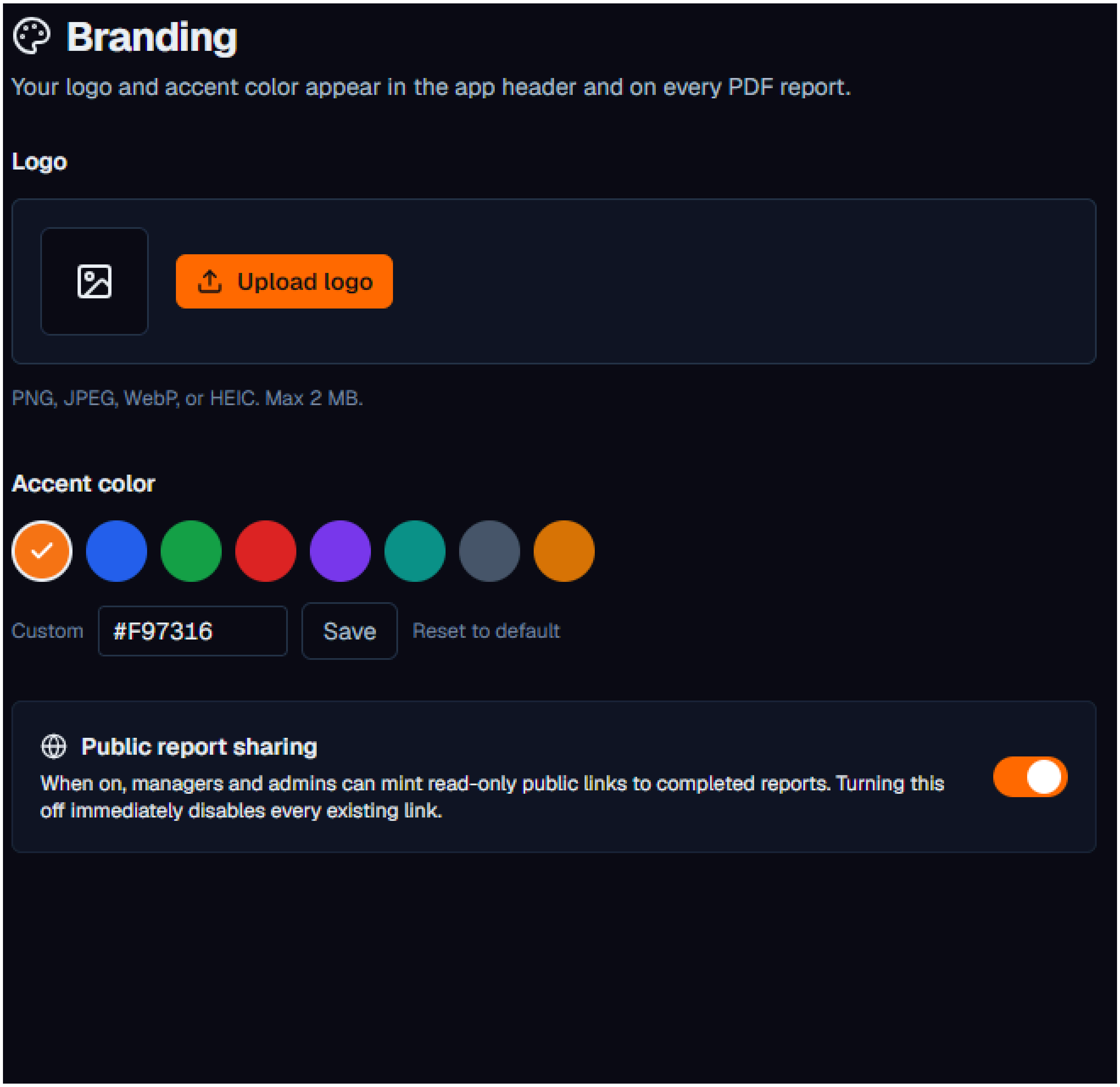
- Invite members - enter an email, pick a role (Inspector / Manager / Admin), and click Invite. Copy the generated signup link and send it. Links expire in 14 days. Pending invites are listed with their status.
- Bulk invite via CSV - invite many people at once from a CSV file.
- The member table - change a member's role, assign their manager (which defines a manager's "My team" view), remove them from the organization, export a member's data (JSON), or permanently delete a member's personal data (for privacy requests).
- Team Assignments - assign direct reports to each manager. There's also an org chart view at /admin/org-chart.

Seat limits depend on your plan (see Section 12) - if you hit a limit, you'll be prompted to upgrade.


Users
Org chart
Set each person's role and who they report to. The last admin can't be demoted, and a manager chain can't loop back on itself.
Invite members
Send a signup link that joins this company with the role you choose. Links expire in 14 days.
person@company.com
Inspector
Invite
Bulk invite via CSV
PENDING INVITES (1)
epitaphlabs@outlook.com
inspector · expires Aug 8, 2026
Cancel
Search by name or email...
3 users
USER
ROLE
MANAGER
ACTIONS
Michael Kromka
you
[redacted]
Admin
— None —
—
Matthew Kromka
[redacted]
Inspector
Michael Kromka
Remove
Jake Kromka
[redacted]
Manager
— None —
Remove

11.2 Branding (admins)

Admin → Branding: upload your company logo (PNG, JPEG, WebP, or HEIC, max 2 MB) and set an accent color (hex code). These appear in the app header and on your reports. The company-wide public sharing on/off switch also lives here - turn it off to disable all public report links.



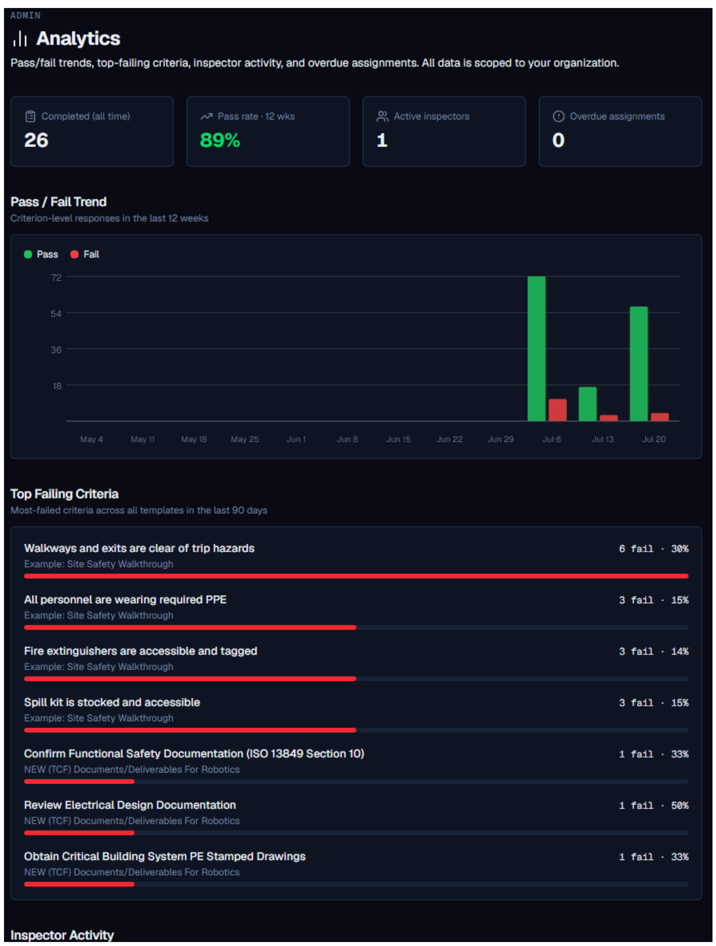
11.3 Integrations (admins)

Admin → Integrations:

- Outbound webhook - send inspection events to any HTTPS endpoint. Toggle Enable outbound webhook, optionally Auto-send on completion, and set your Endpoint URL. Every delivery is signed with your signing secret via the X-Artifact-Signature header so your endpoint can verify authenticity. Use Send test event to verify your setup, and check the Recent deliveries table for status and errors. A step-by-step Jira Automation setup guide on the page shows how to turn failed items into Jira issues automatically.
- Procore - connect your Procore account and pick a target project to push inspections to Procore.
- API keys - create read-only API keys for pulling your inspection data into other systems (Authorization: Bearer <api-key>).

11.4 Analytics (managers & admins)

Admin → Analytics shows inspection trends and failure patterns (e.g. failures over the last 90 days) and per-inspector activity - useful for spotting recurring problems and coverage gaps.



11.5 Export (managers & admins)

Admin → Export downloads your data in bulk: filter by template and date, then export Findings and Inspections as CSV. Admins also have a one-click all-sessions export on the Admin page.

11.6 Audit Log (admins)

Admin → Audit Log records who did what and when across your workspace - role changes, template edits, report reopens, and more.

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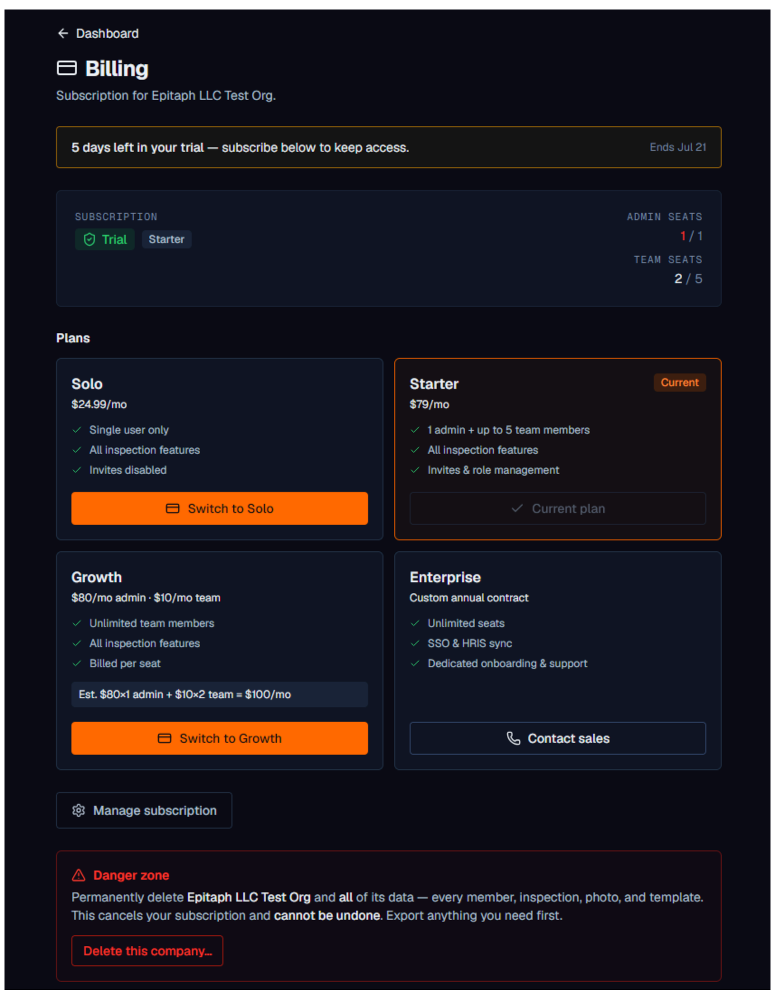
12. Billing & Plans (Admins)

Billing in the nav shows your subscription status, trial countdown, and plan options:

- Solo - $24.99/mo, single user.
- Starter - $79/mo, 1 admin + up to 5 team members.
- Growth - $80/mo per admin + $10/mo per team member (managers and inspectors both count as team members).
- Enterprise - custom annual contract.

New companies start on a 14-day free trial ($0 until the trial ends; cancel anytime before then). During the trial a banner shows how many days remain. Subscriptions, payment methods, and cancellation are managed through the secure Stripe billing portal from this page.

Billing is managed on the website only - it is not available inside the Artifact Field iPhone app.



PART TWO - ARTIFACT FIELD (iPHONE APP)

Artifact Field is the companion app for the people doing the inspecting. It's designed for job sites with no signal: sign in once, and from then on the app opens and runs inspections with no connection at all. Everything you capture is stored on the phone and syncs automatically when you're back in range.

It's an iPhone app. (It will run on an iPad in iPhone-compatibility mode; a native iPad layout is planned for a later release.)

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13. Installing and Signing In

13.1 Installing

Artifact Field is distributed through Apple. Your administrator (or Epitaph) will send you an App Store link - follow it and install the app on your iPhone. The link is also available on the Artifact product page or here: https://apps.apple.com/us/app/artifact-field/id6792311744.

13.2 Signing in

There is no sign-up inside the app - your account is created on the web (Section 1). Once your admin has invited you and you've set your password:

1. Open Artifact Field.
2. Enter the same Email and Password you use on artifact.epitaph.llc.
3. Tap Sign in.

The sign-in screen says it plainly: "Sign in once to use inspections offline on this device." After that first successful sign-in, the app opens straight to your work - online or off.

If you see "This account is not part of an organization. Ask your admin for access.", your account exists but hasn't been added to a company yet - contact your admin.

Important, before you head out: sign in and tap Refresh at least once while you have a connection. That's what downloads your templates, assignments, reports, and corrective actions onto the phone for offline use.

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14. The Field Home Screen

The home screen is titled "Start an inspection" and is built to be readable at a glance with gloves on.

Top row:

- A status indicator - Online, or "Offline - working from this device".

- Sync now - pushes finished work up and pulls fresh data down (needs a connection).
- Sign out - see the warning in Section 19.

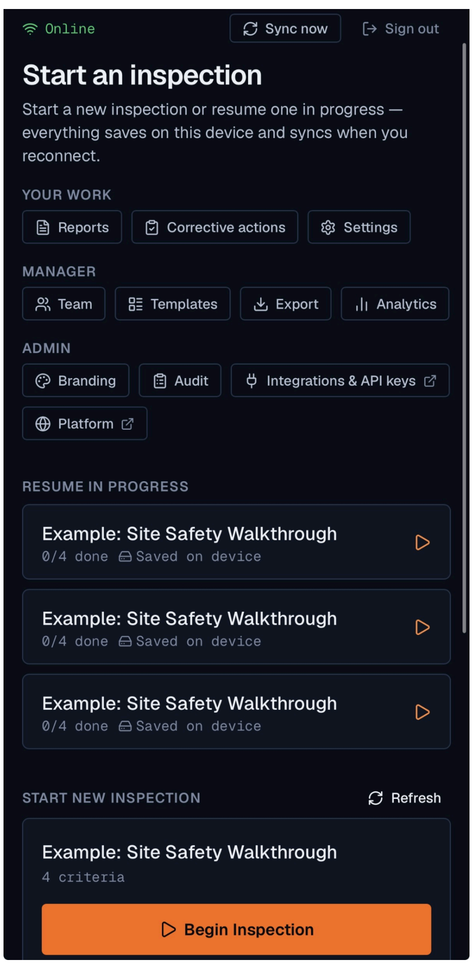
Navigation sections (you only see the ones your role allows):

- Your work (everyone) - Reports, Corrective actions.
- Manager (managers and admins) - Team, Templates, Export, Analytics.
- Admin (admins) - Branding, Audit, plus Integrations & API keys and Platform, which open in Safari because they're desk tools. Billing is not shown in the app; manage it on the website.

Your work lists, in order:

1. Resume in progress - inspections you've started but not finished, each showing "3/12 done" and its sync status. Tap to pick up exactly where you left off.
2. Assigned to you - open assignments with their location, asset, and due date (overdue dates show in red). Tap the button to start.
3. Start new inspection - every template saved on this device, each with its criteria count and a Begin Inspection button. The Refresh button here re-downloads templates and other cached data.

If you haven't cached anything yet you'll see: "No templates are saved on this device yet. Connect once and tap Refresh to make them available offline."



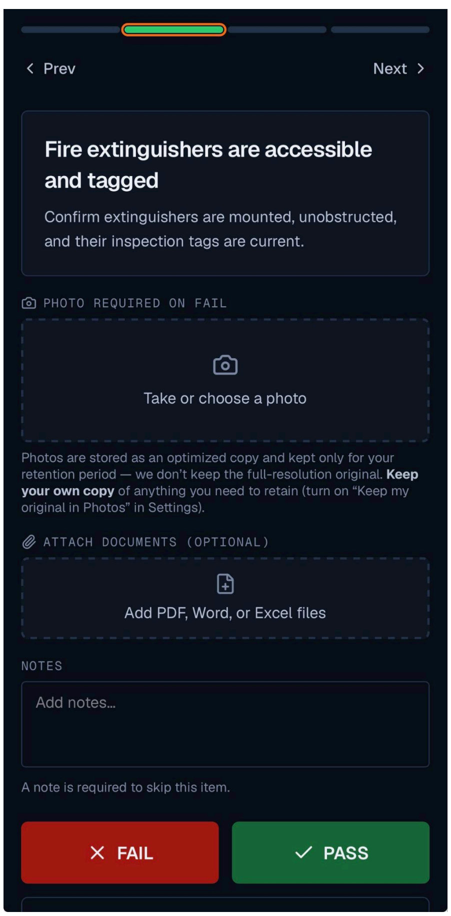
15. Running an Inspection in the Field App

Tap Begin Inspection on a template (choosing a location/asset if the template offers them), or start an assignment.

The inspection runner is exactly the same as the web app - see Section 7 for the full walkthrough: step-by-step items, photos, document attachments, notes, and the PASS / FAIL / FLAG / Skip / N/A verdicts, with the same template rules enforced.

What's different in the field app:

- It all works offline. Every answer is written to the phone immediately.
- Photos are optimized on the device before they're stored, so a full day of inspecting doesn't fill your phone or your data plan.
- You can leave mid-inspection safely. Tap Home at the top; the session reappears under "Resume in progress."
- Finishing works offline too. A completed inspection sits on the phone with its sync status shown, and uploads itself the next time you have a connection (or when you tap Sync now).



16. Reports in the Field App

Tap Reports from the home screen. Reports are split into two lists:

- On this device - inspections you completed on this phone, each showing its sync status.
- Synced reports - reports pulled down from the server. (If this is empty: "No synced reports cached yet. Connect once and tap Refresh.")

Open any report to see the full results, notes, and photos. From a report you can:

- Share the PDF - generates the report PDF and opens the standard iOS share sheet, so you can email it, message it, save it to Files, or send it to any app on your phone.
- Managers and admins, while online, also get: creating corrective actions from the report, Reopen / amend report ("Reopen to amend verdicts, notes, and the asset/location - every change is audited and shown on the report"), and public share links.

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17. Corrective Actions in the Field App

Tap Corrective actions - "Remediation work assigned to you."

- The list is cached, so you can review your open items with no connection.
- Updating an action - changing its status, due date, or assignee - needs a connection. Offline, those controls are disabled and a "needs a connection" note appears.

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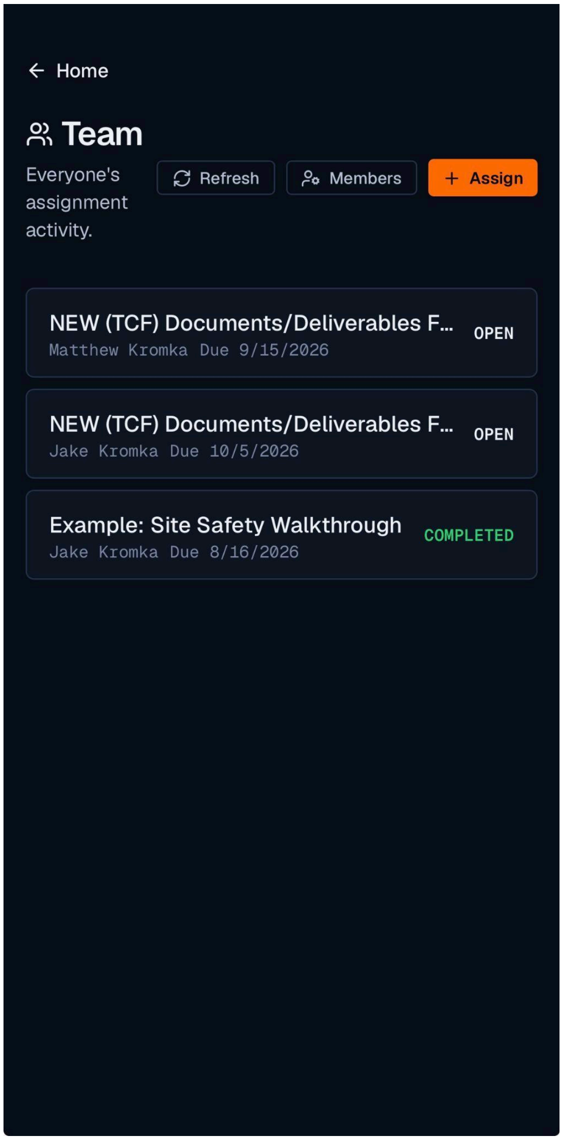
18. Manager & Admin Screens in the Field App

Managers and admins can run most of the business from the phone. These screens are live management screens and need a connection - each shows a clear banner when you're offline (e.g. "Team activity needs a connection - reconnect and refresh.").

- Team (managers, admins) - your team's assignment activity, with Assign to create a new assignment. Admins also get Members: change roles, set each person's manager, and deactivate or reactivate members. There's a bulk invite screen that accepts a list like jane@acme.com,inspector.
- Templates (managers, admins) - full template management from the phone: create, edit, archive, duplicate, and move templates; create, rename, and delete folders; capture a criterion's example image with the camera; and the same "Start from an existing checklist" AI generation as the web.
- Export (managers, admins) - filter and export your data; the file opens through the iOS share sheet.
- Analytics (managers, admins) - the same inspection and failure trends as the web.
- Branding (admins) - logo and accent color.
- Audit (admins) - your organization's audit log.

- Integrations & API keys and Platform open in Safari. Billing is web-only.



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19. Syncing, Signing Out, and Data on Your Phone

Syncing. The app syncs on its own when a connection returns. Sync now on the home screen forces a pass. Each in-progress and completed inspection shows its own sync status, so you can confirm your work made it up before you close out the day.

If your session expires, the app will ask you to sign in again - your saved work stays on the device.

Signing out wipes the device. Tap Sign out and you'll be asked to confirm: "Sign out? Any inspections that haven't synced will be removed from this device." This is deliberate - it keeps company data off a phone that's been handed to someone else. The same wipe happens automatically if a different user signs in on that phone.

Before signing out, make sure everything has synced. Connect, tap Sync now, and confirm nothing is still pending.

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20. Which App Should I Use?

What you're doing	Use
Signing up, billing, subscription	Web only
Running inspections in the field	Artifact Field (or web offline)
Building and editing templates	Either
Assigning work, managing your team	Either (web is roomier)
Reading reports, sharing PDFs	Either
Working corrective actions	Either (updates need a connection)
Integrations, API keys, Procore	Web only

Both use the same account and the same data - whatever you do in one shows up in the other.

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21. Quick Reference - Your First Day

As an admin setting up a company:

1. Sign up on the web and start your trial (Section 1.1).
2. Create your first template - try the AI import if you have an existing checklist (Section 5).
3. Invite your team from Admin → Users (Section 11.1).
4. Assign the first inspections (Section 6).
5. Optionally: add your logo and accent color (Section 11.2).
6. Tell your field crew to install Artifact Field (Section 13).

As an inspector:

1. Accept your invite and set your password on the web (Section 1.2).
2. Install Artifact Field and sign in with those same credentials (Section 13).
3. While you still have signal, tap Refresh so your templates and assignments are on the phone (Section 13.2).
4. Head out and run your first inspection - no connection needed (Section 15).
5. Back in range, confirm your work synced (Section 19).

Questions? Contact us at support@epitaph.llc or through the contact form at https://epitaph.llc/contact.